Access and Identity Management (AIM) User Guide

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REVISION HISTORY

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2.3	7/25/14	RMadrigal	Updated with new Create ACL Group button

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Introduction

The Access and Identity Management (AIM) application has been developed to improve the process for requesting, obtaining, updating and maintaining user access to ISO applications.

The ISO maintains approximately 4,000 secured customer accounts granting access to roughly two dozen ISO applications. Each customer has designated one or more individuals within their organization to act as the point of contact (POC), authorized to initiate and maintain access to ISO applications.

To view a list of DRS or OMAR users, contact your client representative or send an e-mail to POCrequests@caiso.com.

The AIM application provides registered POCs with the ability to view application-level access for all of their organization's users as well as any users from other organizations who have access to their resources (endorsed users). Additionally, the AIM application will allow the registered POC to view the expiration date of their users' certificates and automatically request a renewal from within the application.

If you are not a registered AIM POC, please submit a request to POCrequests@caiso.com to be placed in the queue to obtain access as **AIM will be the only method to renew your users' certificates going forward**.

Auto-provisioned Applications

The following applications can be auto-provisioned from within AIM: SIBR, CMRI, MRI-S, MFRD, RAAM, CIDI, MPP, CRTMGT, and RIMS GEN.

Access changes will continue to be submitted via the AARF form through CIDI for the applications that are not automated in AIM, and for endorsed users.

Data Accuracy

The data displayed in AIM represents actual end user access to ISO systems. This information is updated twice per day, by approximately 9:00am and 9:00pm. Customer POCs are responsible for validating the accuracy of the information presented and following the appropriate process for modifying end user access. Please email POCrequests@caiso.com with any questions.

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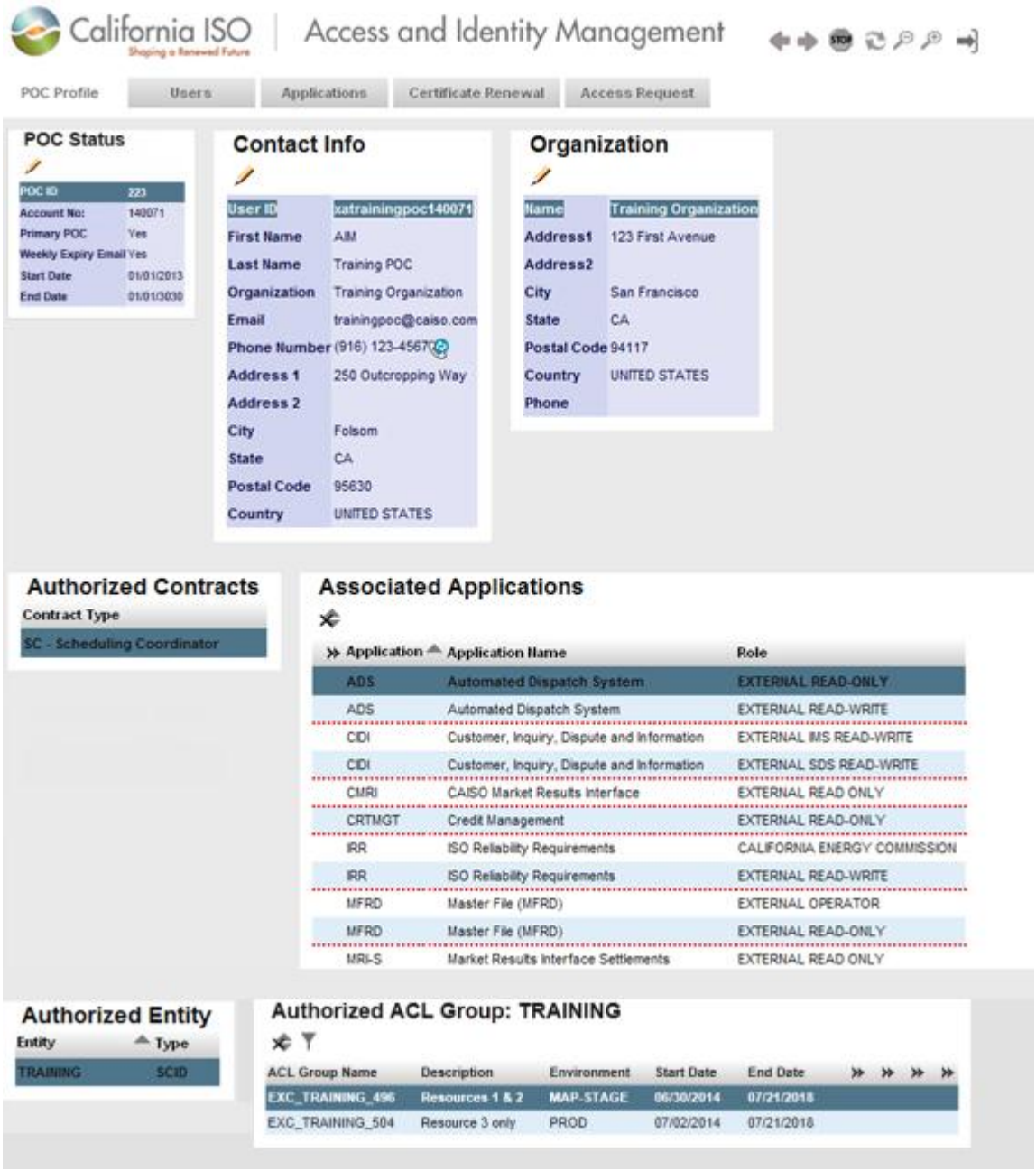
Review of AIM Screens

POC Profile

The **POC Profile** Tab displays contact information for an individual POC.



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POC Status (read/write)

POC ID: This is an internal reference number within AIM

Account No: This is an internal reference number within AIM

Primary POC: This indicates whether or not the POC is listed as the primary contact for the organization. There is no functional differentiation between the primary and secondary POC(s) within AIM.

Weekly Expiry Email: Click the pencil icon to change this field to No in order to opt-out of the weekly certificate expiry email messages.

Start Date: The date the individual became an AIM registered POC.

End Date: This is the projected end date of the POC term. This will typically be an arbitrary date far into the future.

Contact Information (read/write)

The **Contact Information** section contains the personal contact information for the POC. Click on the pencil icon to update email, phone number, or address information.

The First Name, Last Name, and Organization fields cannot be changed by the POC. If these items need to be updated, contact your client representative or send an e-mail to POCrequests@caiso.com.

Organization (read/write)

The address listed in the **Organization** section is for the home office of the organization. This may be a different address than what is listed for the POC Contact Info.

Click on the pencil icon to update the organization's address. The Name cannot be changed by the POC as this is the organization's legal name. If the organization name needs to be updated, contact your client representative or send an e-mail to POCrequests@caiso.com.

Authorized Contracts (read only)

The **Authorized Contracts** section displays a list of the contract types that are associated with the POC.

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Associated Applications (read only)

The **Associated Applications** section displays a list of the ISO applications that the POC is authorized to provision access to, based on contract types.

Authorized Entity (read only)

The **Authorized Entity** section displays a list of the organization's entities that are associated with the POC.

Authorized ACL Group (read only)

The **Authorized ACL Group** section displays a list of the Access Control List (ACL) groups that isolate and grant access to a single asset (or group of assets).

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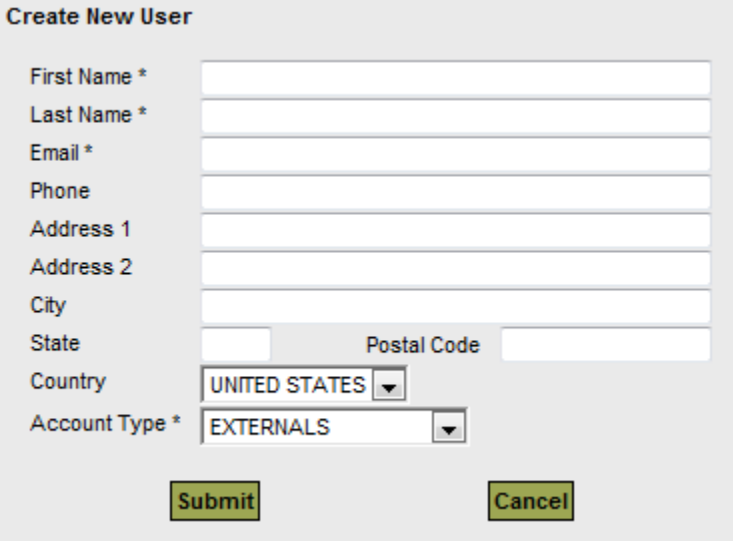
Users

The **Users** Tab provides the ability to view a list of users. This is also the screen that the POC will access in order to create a new user.

The user list is separated into two sections: **My Users** (users who belong to the POC's organization) and **Endorsed Users** (users from another organization who have been granted access to specific Entities (usually an SCID) or resources in specific applications).

Create New User

Click the **Create New User** button to add a new user to the organization. Enter the user's name and address information and click the **Submit** button.



Note: The user must be created before an access request can be submitted. A new user will have a status of "New" until a certificate is posted for the user; at which time, the status will change to "Active".

Note: After a new user is created, the POC will receive an email regarding the certificate that has been created for the new user. The POC has the option to forward this email to the user, or register for the certificate directly and then install it on the user's machine.

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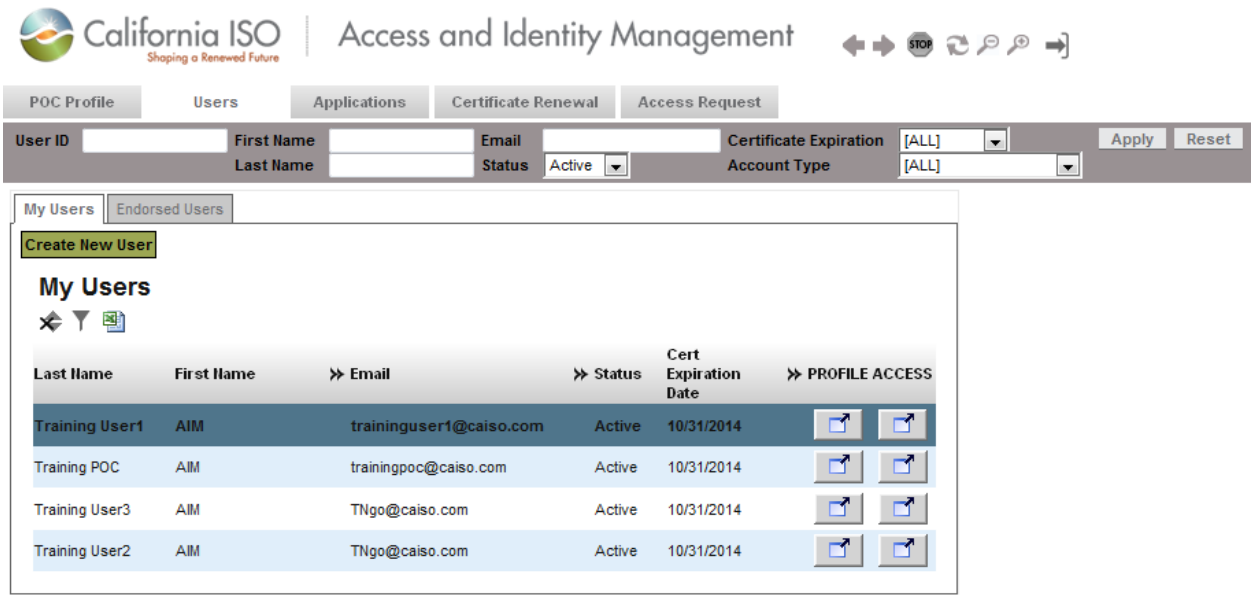
My Users



The user list will display 100 users per page. There are a number of filtering options which provide the ability to view a subset of users. AIM provides the ability to filter the following fields using the asterisk (*) wildcard search parameter: User ID, First Name, Last Name, and Email. AIM also provides the ability to filter by Certificate Expiration (e.g., all certificates expiring in less than 60 days), Status (Active/Inactive), and Account Type (External/External System). An External account type is a human user, while an External System account type is an integration certificate or machine certificate.

Some columns in the user list are hidden by default. Click on the » icon to view a hidden column.

Note: Columns in ALL CAPS contain clickable fields that will display a pop up window containing additional information. (See the following screenshot).

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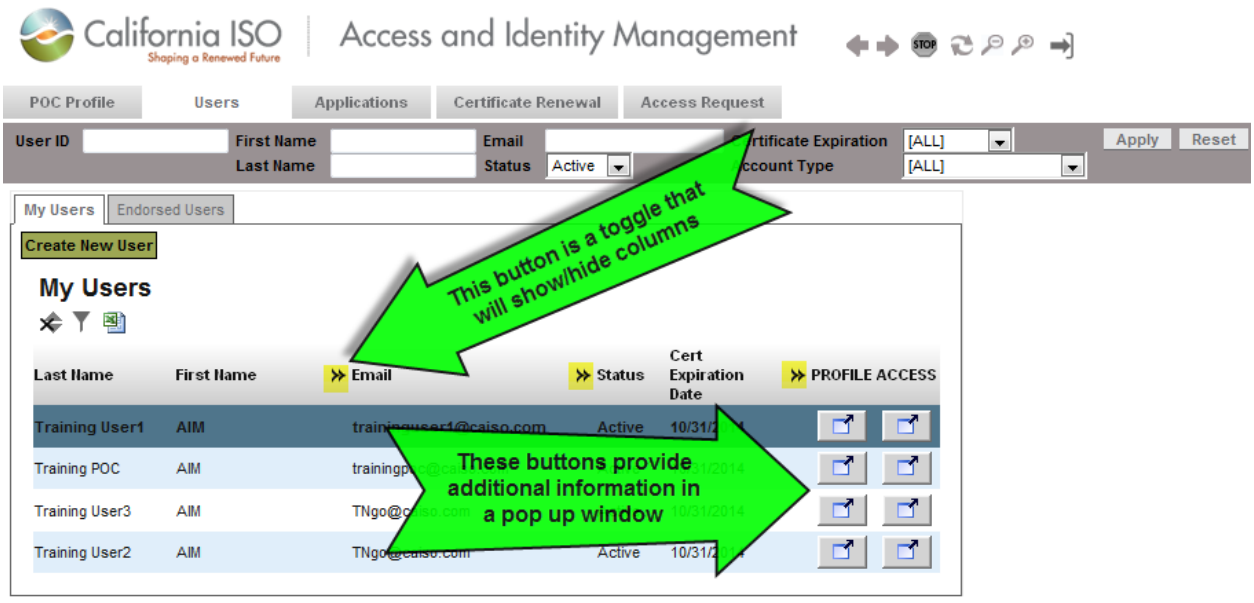

Note: You may see California ISO test user accounts with the name structure of "AIM Tester#" and "AIM Tester#x#" listed as endorsed users with access to your resources. These are internal CAISO Quality Assurance certificates and are used for internal testing purposes. During periods of ISO testing, these users may be listed as belonging to your organization. PLEASE DO NOT EDIT OR DELETE THESE USERS as they are critical to the ISO's internal testing of the AIM application. When the test cycle is complete, these users will no longer appear as belonging to your organization.

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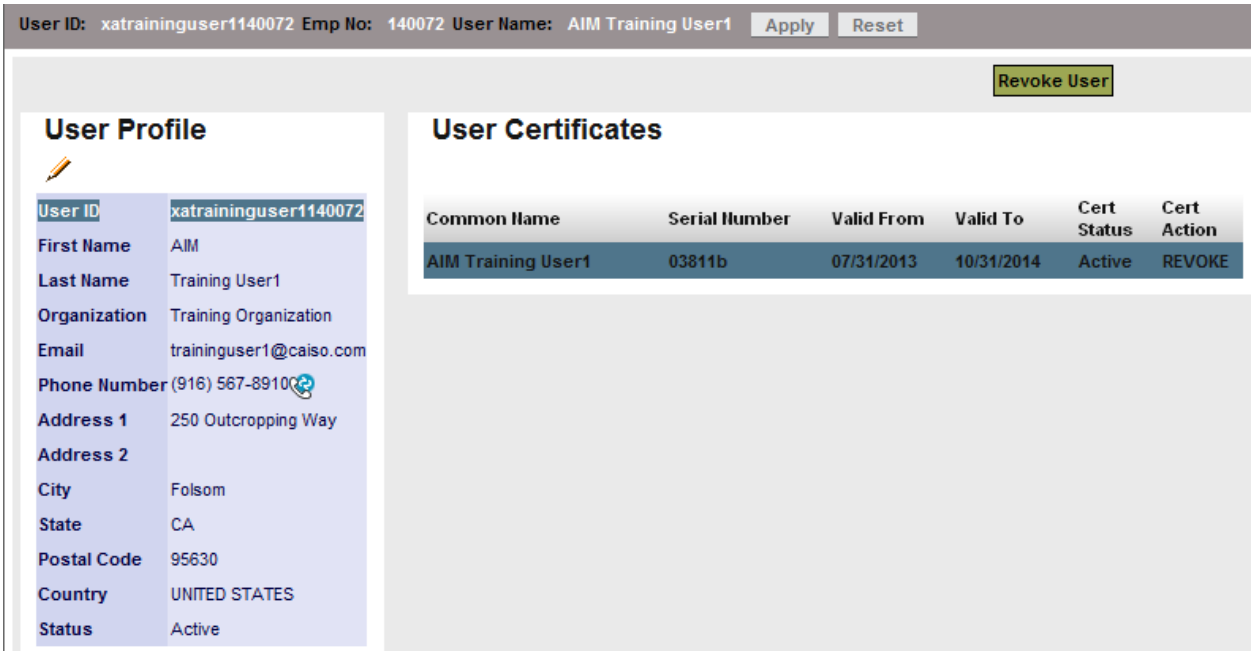
User Profile (PROFILE)

The **User Profile** window contains the personal contact and certificate information for the selected user. This is the screen that the POC will access in order to revoke all access from a specific user.



Click on the pencil icon to update email, phone number, or address information for the user.

The First Name, Last Name, and Organization fields cannot be changed by the POC. If these items need to be updated, contact your client representative or send an e-mail to POCrequests@caiso.com.

Note: The email address is particularly important as this is the email address that will be used when the user's certificate needs to be renewed. If an email address is changed in the user profile, this change will not be reflected in other portions of AIM until the data is updated during the next data sync period (usually within 12 – 24 hours).

The **User Certificates** panel displays the user's certificate history. The active certificate is at the top of the list. There may also be additional inactive certificates shown from previous years.

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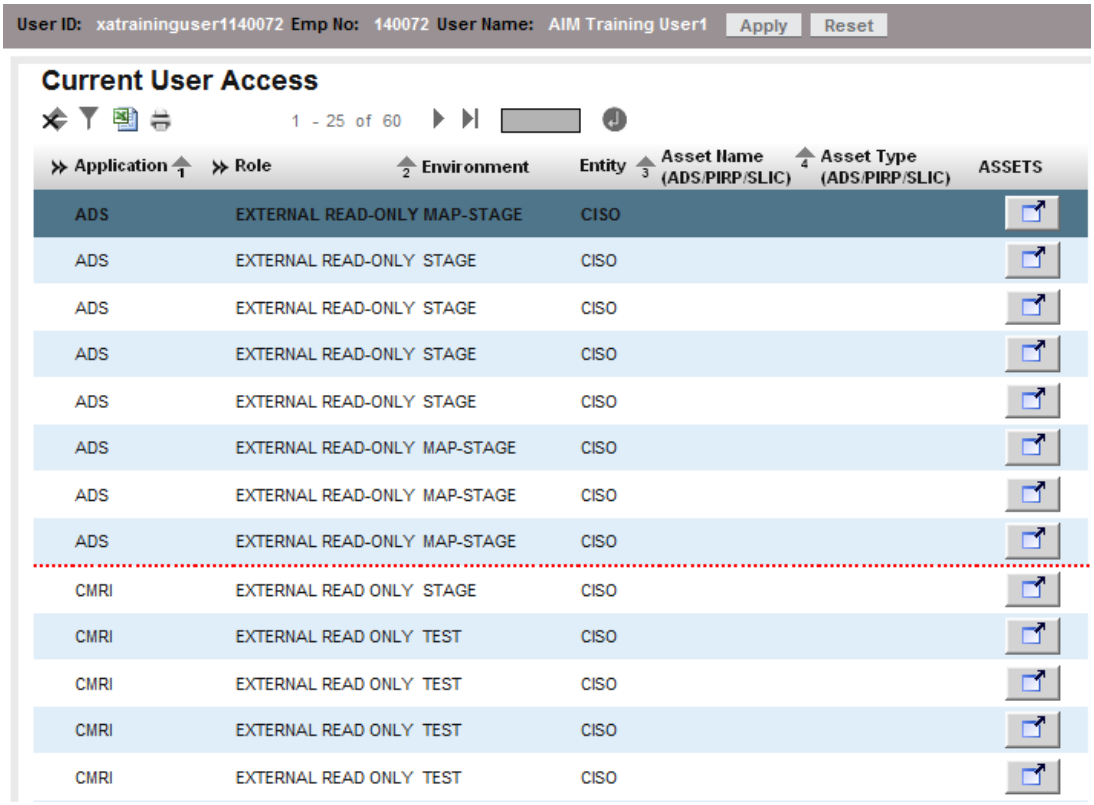
Current User Access (ACCESS)

The **Current User Access** window displays a list of all applications and Entities the selected user has access to. This window also provides access to the **Entity Assets** window for the Assets that belong to the POC's organization.


User ID: xatraininguser1140072 Emp No: 140072 User Name: AIM Training User1
Apply
Reset
Current User Access
1 - 25 of 60
Application
Role
Environment
Entity
Asset Name (ADS/IRP/SLIC)
Asset Type (ADS/IRP/SLIC)
ASSETS
ADS EXTERNAL READ-ONLY MAP-STAGE CISO
ADS EXTERNAL READ-ONLY STAGE CISO
ADS EXTERNAL READ-ONLY STAGE CISO
ADS EXTERNAL READ-ONLY STAGE CISO
ADS EXTERNAL READ-ONLY STAGE CISO
ADS EXTERNAL READ-ONLY MAP-STAGE CISO
ADS EXTERNAL READ-ONLY MAP-STAGE CISO
ADS EXTERNAL READ-ONLY MAP-STAGE CISO
CMRI EXTERNAL READ ONLY STAGE CISO
CMRI EXTERNAL READ ONLY TEST CISO
CMRI EXTERNAL READ ONLY TEST CISO
CMRI EXTERNAL READ ONLY TEST CISO
CMRI EXTERNAL READ ONLY TEST CISO

The access list will display 25 rows per page.

Note: If the user has been endorsed by another organization, the Entity for that organization (usually an SCID) will be included on this list.

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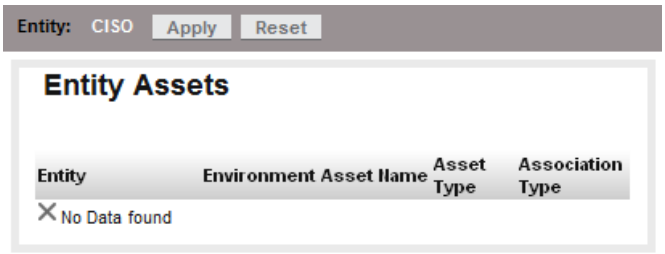
Entity Assets (ASSETS)

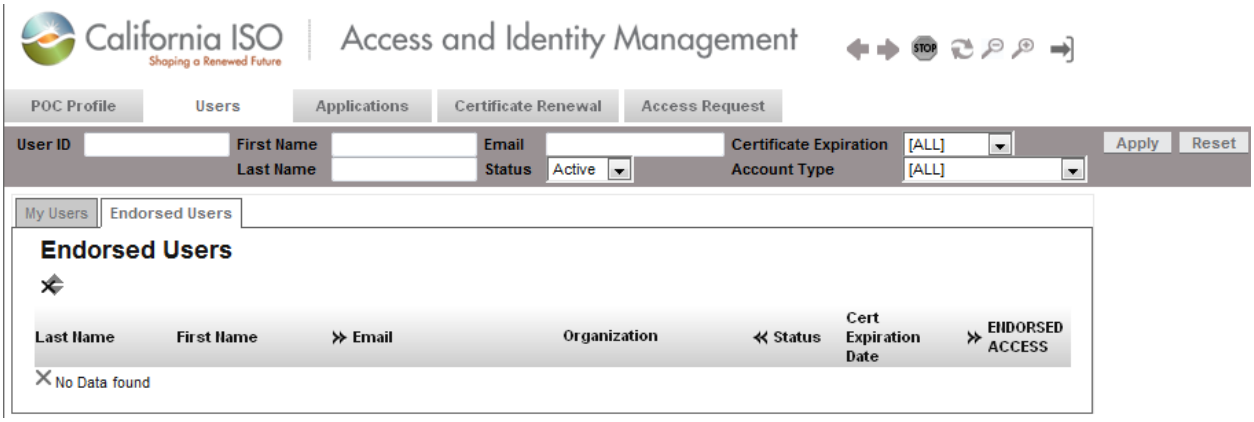
The **Entity Assets** window displays the list of Assets (resources) that the selected user is able to view for the selected application.



This list will display information for each resource based on Master File data.

Endorsed Users

Click the **Endorsed Users** Tab to view the list of endorsed users.



The user list will display 100 users per page. There are a number of filtering options which provide the ability to view a subset of users. AIM provides the ability to filter the following fields using the asterisk (*) wildcard search parameter: User ID, First Name, Last Name, and Email. AIM also provides the ability to filter by Certificate Expiration (e.g., all certificates expiring in less than 60 days), Status (Active/Inactive), and Account Type (External/External System). An External account type is a human user, while an External System account type is an integration certificate or machine certificate. It is important to always use the asterisk (*) at the end of each search to ensure that you retrieve all current access for that user.

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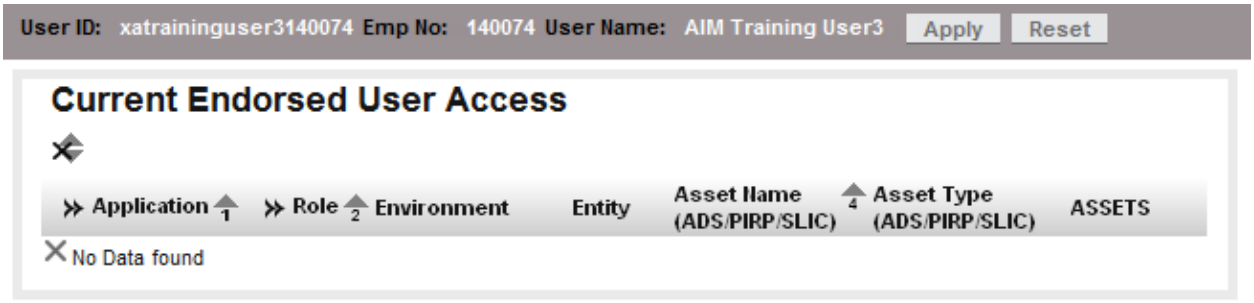
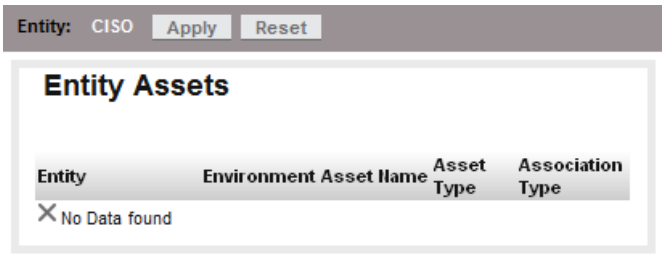
Current Endorsed User Access (ENDORSED ACCESS)

Click the button in the **ENDORSED ACCESS** column to view the **Current Endorsed User Access** window. This window displays a list of all applications the endorsed user has access to. This window also provides access to the **Entity Assets** window for the Assets that belong to the POC's organization.



Entity Assets (ASSETS)

The **Entity Assets** window displays the list of Assets (resources) that the endorsed user is able to view for the selected application.



This list will display information for each resource based on Master File data.

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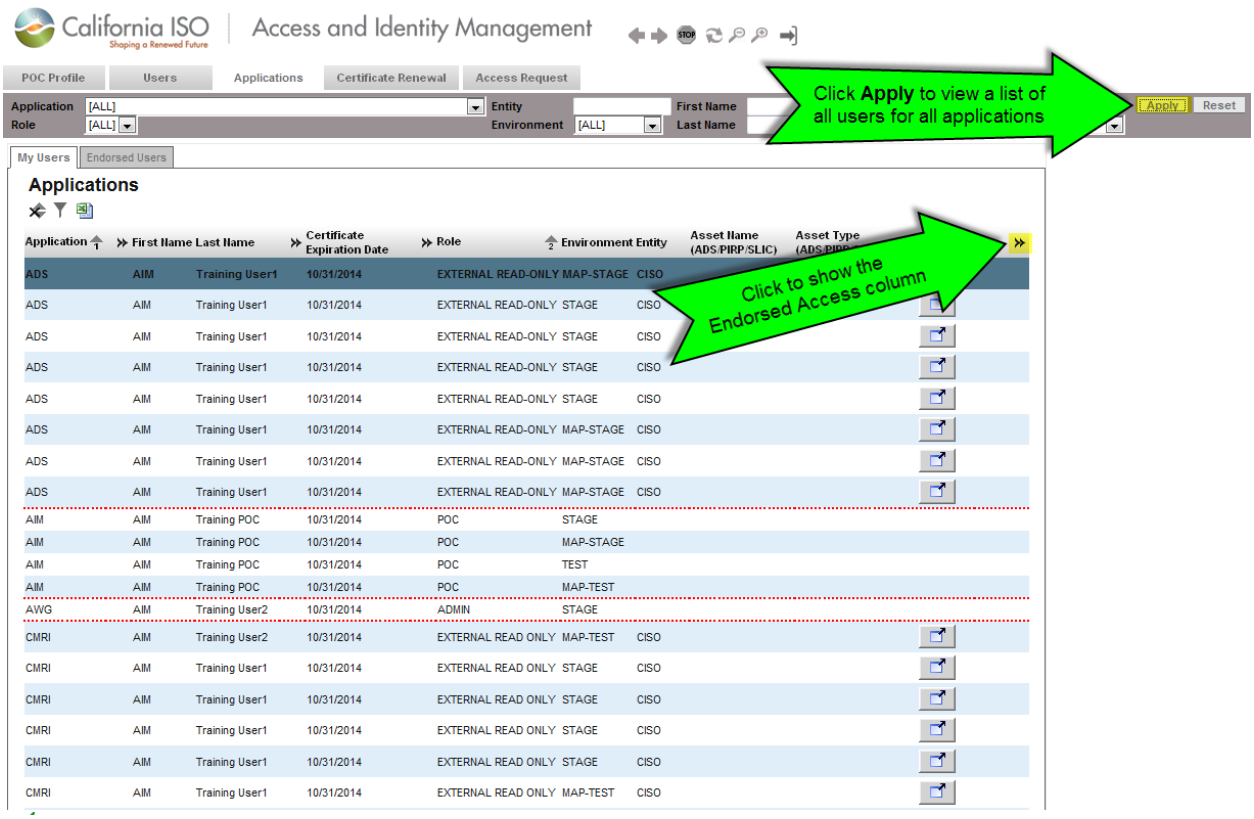
Applications

The **Applications** Tab provides the ability to view a list of users by application. This screen loads without any filters applied and displays a blank list of users. The user list is separated into two sections: **My Users** (users who belong to the POC's organization) and **Endorsed Users** (users from another organization who have been granted access to specific Entities (usually an SCID) or resources in specific applications).

My Users

Click the **Apply** button to view a list of all users for all applications. This window also provides access to the **Entity Assets** window for the Assets that belong to the POC's organization.



Application	First Name	Last Name	Certificate Expiration Date	Role	Environment	Entity	Asset Name (ADS/PIRP/SLIC)	Asset Type (ADS/PIRP
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	MAP-STAGE	CISO		
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	STAGE	CISO		
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	STAGE	CISO		
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	STAGE	CISO		
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	STAGE	CISO		
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	MAP-STAGE	CISO		
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	MAP-STAGE	CISO		
ADS	AIM	Training User1	10/31/2014	EXTERNAL READ-ONLY	MAP-STAGE	CISO		
AIM	AIM	Training POC	10/31/2014	POC	STAGE			
AIM	AIM	Training POC	10/31/2014	POC	MAP-STAGE			
AIM	AIM	Training POC	10/31/2014	POC	TEST			
AIM	AIM	Training POC	10/31/2014	POC	MAP-TEST			
AWG	AIM	Training User2	10/31/2014	ADMIN	STAGE			
CMRI	AIM	Training User2	10/31/2014	EXTERNAL READ ONLY	MAP-TEST	CISO		
CMRI	AIM	Training User1	10/31/2014	EXTERNAL READ ONLY	STAGE	CISO		
CMRI	AIM	Training User1	10/31/2014	EXTERNAL READ ONLY	STAGE	CISO		
CMRI	AIM	Training User1	10/31/2014	EXTERNAL READ ONLY	STAGE	CISO		
CMRI	AIM	Training User1	10/31/2014	EXTERNAL READ ONLY	STAGE	CISO		
CMRI	AIM	Training User1	10/31/2014	EXTERNAL READ ONLY	MAP-TEST	CISO		

The user list will display 100 users per page. There are a number of filtering options which provide the ability to view a subset of users by application. AIM provides the ability to filter the following fields using the asterisk (*) wildcard search parameter: Entity, First Name, and Last Name.

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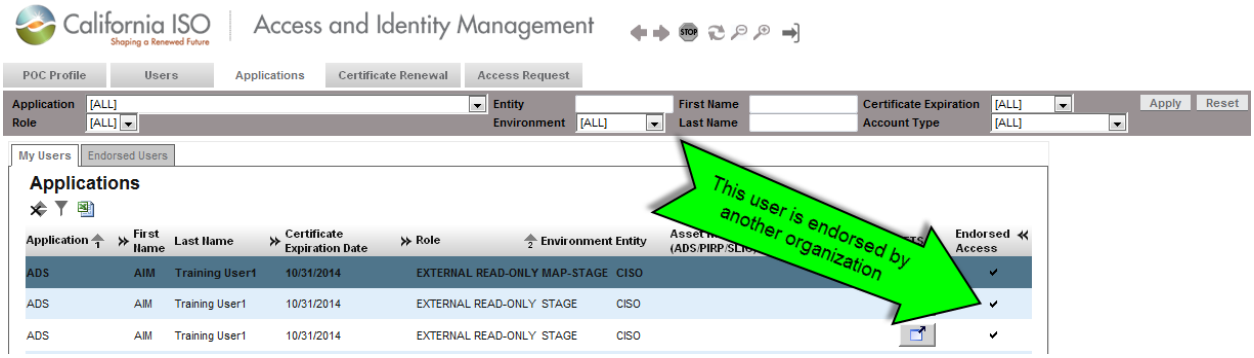
AIM also provides the ability to filter by Application, Certificate Expiration, Role, Environment, and Account Type.

To identify which users have been endorsed by other organizations, click the » icon in the column on the far left of the **My Users** window to show the **Endorsed** column. If a user has been given access to an Entity that belongs to another organization, you will see a check mark in the **Endorsed Access** column next to the line entry for that specific Entity (usually an SCID) for that application.



Entity Assets (ASSETS)

The **Entity Assets** window displays the list of Assets (resources) that the selected user is able to view for the selected application.

This list will display information for each resource based on Master File data.

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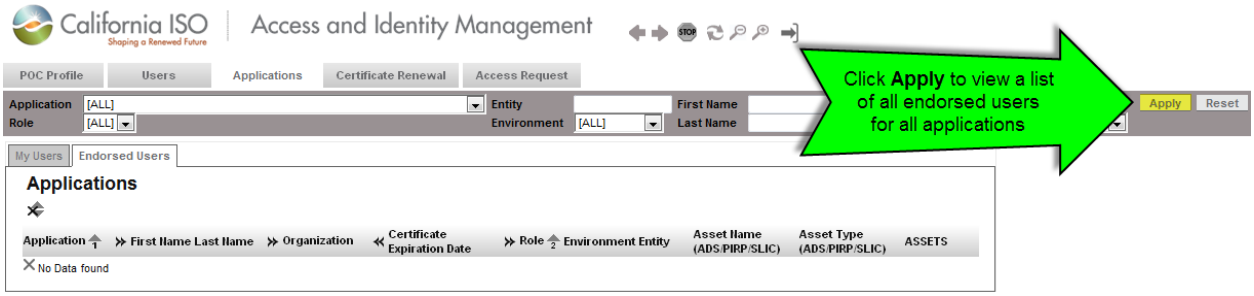
Endorsed Users

Click the **Endorsed Users** Tab and click the **Apply** button to view a list of all endorsed users for all applications. This window also provides access to the **Entity Assets** window for the Assets that belong to the POC's organization.

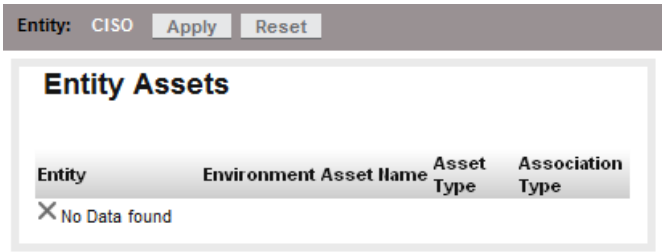


The user list will display 100 users per page. There are a number of filtering options which provide the ability to view a subset of users by application. AIM provides the ability to filter the following fields using the asterisk (*) wildcard search parameter: Entity, First Name, and Last Name.

AIM also provides the ability to filter by Application, Certificate Expiration, Role, Environment, and Account Type.

Entity Assets (ASSETS)

The **Entity Assets** window displays the list of Assets (resources) that the endorsed user is able to view for the selected application.



This list will display information for each resource based on Master File data.

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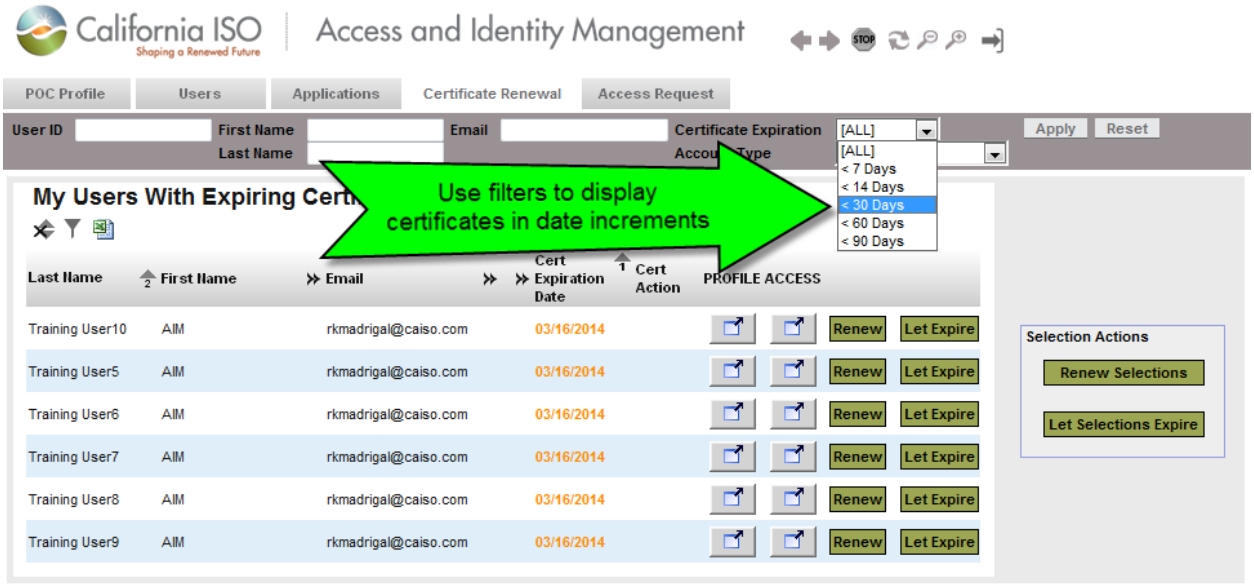
Certificate Renewal

The **Certificate Renewal** screen will display a list of all users whose certificates are set to expire in date increments up to 90 days. The POC will access this screen to manage the renewal of user certificates.



Note: Certificates **cannot** be renewed more than 90 days in advance. If the user's certificate expiration date is more than 90 days in the future, they will not show up on this list.

Click the **Renew** or **Let Expire** button on an individual line item. Another option is to use the **"Shift + click"** or **"Ctrl + click"** functionality to select multiple users simultaneously. After selecting multiple users, click the **Renew Selections** or **Let Selections Expire** button to apply it to all items selected.

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The POC will receive an email each week that contains a list of all users whose certificates are set to expire within 90 days or less. The email message will be in the following format:

From: AIMAdmin@caiso.com [mailto:AIMAdmin@caiso.com]
Sent: Monday, December 09, 2013 1:33 AM
To: AIMAdmin
Cc: AIMAdmin
Subject: ACTION Required: Expiring California ISO CMA Digital Certificates - STAGE

Below is a list of users that have California ISO Multiple Application (CMA) digital certificates issued in their name. These CMA digital certificates must be renewed online by the users' Point of Contact (POC) before renewal certificates can be issued. Please review the certificates below, log into the Access Identity Management (AIM) application, and authorize any digital certificates you need renewed by selecting the RENEW option. If there are any users who do not require certificates, select from the REVOKE option (process the revocation immediately) or LET EXPIRE option (process the revocation on the certificate expiration date). Access the AIM application at "https://portal.caiso.com/aim" and follow the AIM Users Guide located here: "http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf".

Less Than 90 days				
First Name	Last Name	User Id	Email	Certificate Valid To
AIM	Training User10	xatraininguser10155123	rkmadrigal@caiso.com	2014-02-25 07:00:00.0
AIM	Training User5	xatraininguser5155118	rkmadrigal@caiso.com	2014-02-25 07:00:00.0
AIM	Training User6	xatraininguser6155119	rkmadrigal@caiso.com	2014-02-25 07:00:00.0
AIM	Training User7	xatraininguser7155120	rkmadrigal@caiso.com	2014-02-25 07:00:00.0
AIM	Training User8	xatraininguser8155121	rkmadrigal@caiso.com	2014-02-25 07:00:00.0

If you are no longer a POC for these users, please submit the POC Establishment and Change Form located here: "http://www.caiso.com/Documents/Point%20of%20contact%20establishment%20and%20requirements". For any issues or more information please contact your California ISO Customer Service representative or the ISO Help Desk at HelpDesk@caiso.com, 916-351-2309 or 888-889-0450.

Sincerely,

CAISO Team

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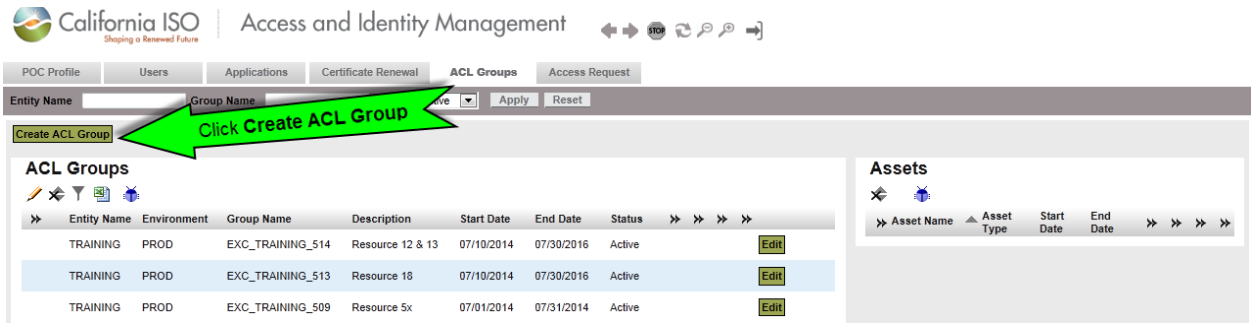
ACL Groups

An Access Control List (ACL) defines the access rights each user has to particular assets. The **ACL Groups** screen provides the POC with the ability to create new ACL groups to isolate and grant access to a single asset (or group of assets).

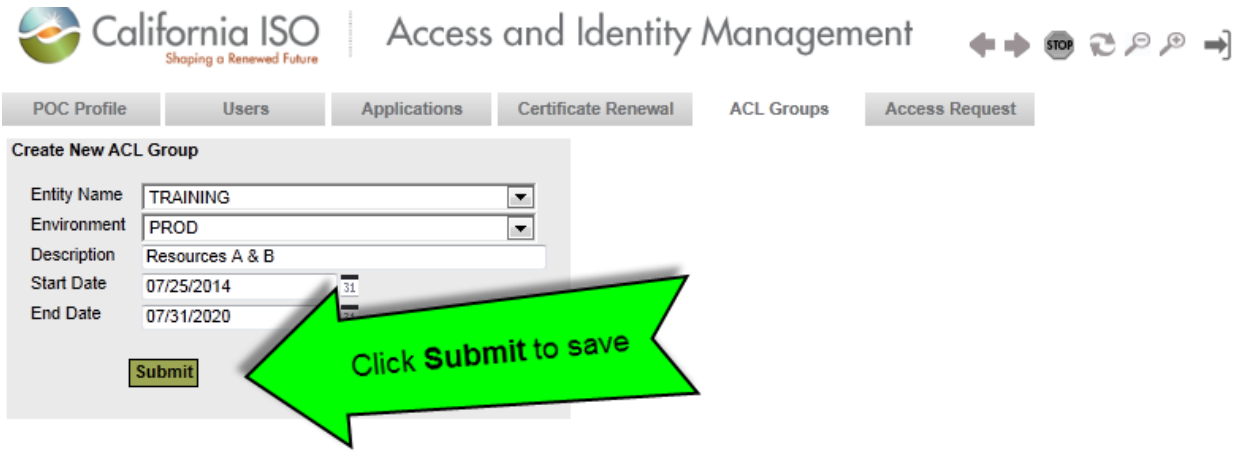
New ACL Group

Click the **Create ACL Group** button to create an ACL group.



Select the **Entity Name, Environment,** and enter a **Description** for the ACL group.

Select a **Start Date** and an **End Date** for the ACL group and click the **Submit** button.



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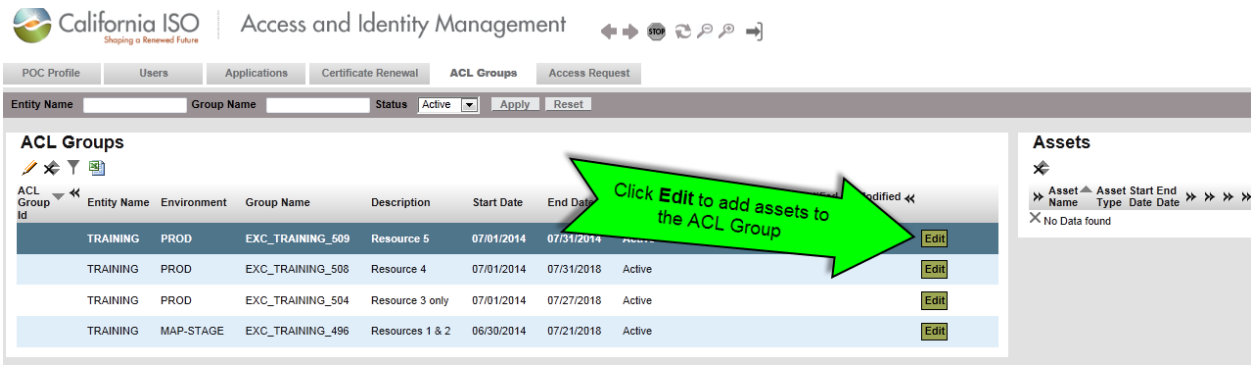
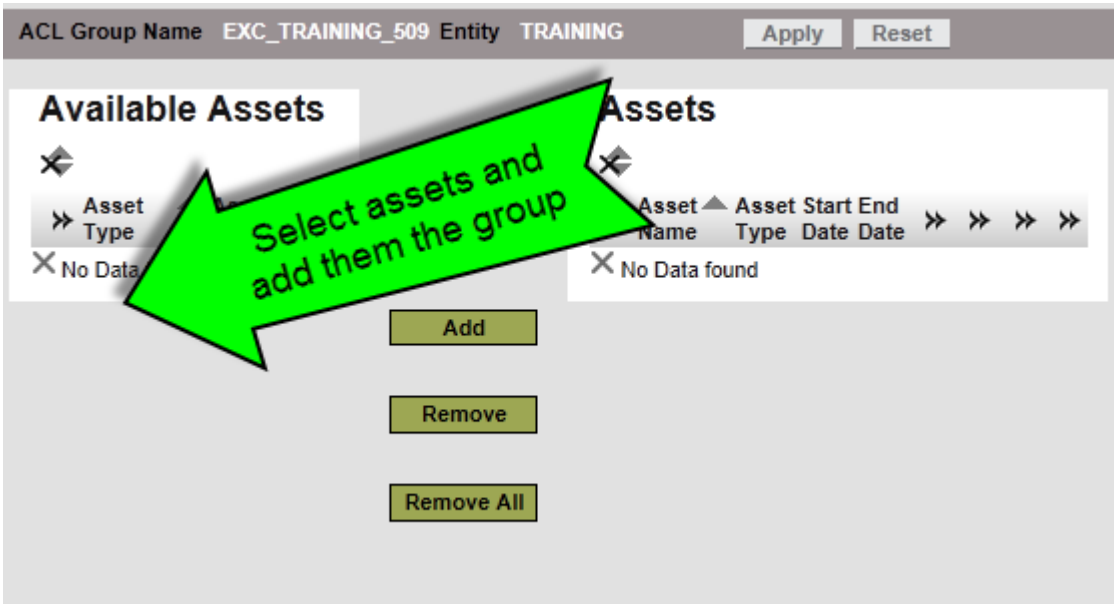
Add Assets to an ACL Group

Click the **Edit** button to add assets to the ACL group.



Note: The **Group Name** entry is automatically generated by AIM when the ACL group is created.

Select an asset from the **Available Assets** list and click the **Add** button to add an asset to the ACL group.



Note: The asset is automatically added to the group once the **Add** button is clicked. Simply close the window when all assets have been added.

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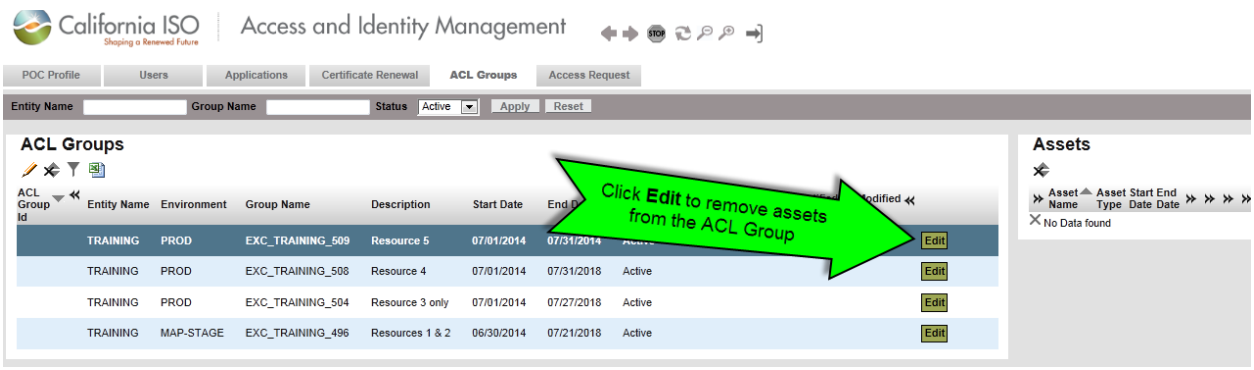
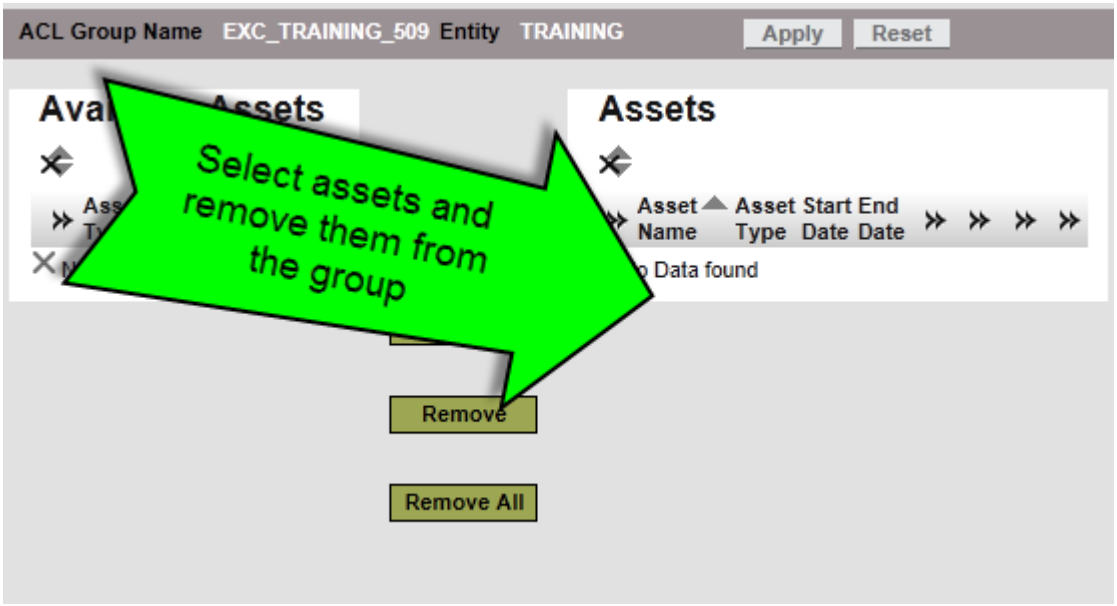
Remove Assets from an ACL Group

Click the **Edit** button to remove assets from the ACL group.



Select an asset from the **Assets** list and click the **Remove** button to remove it from the ACL group.



Note: The asset is automatically removed from the group once the **Remove** button is clicked. Simply close the window when all assets have been removed.

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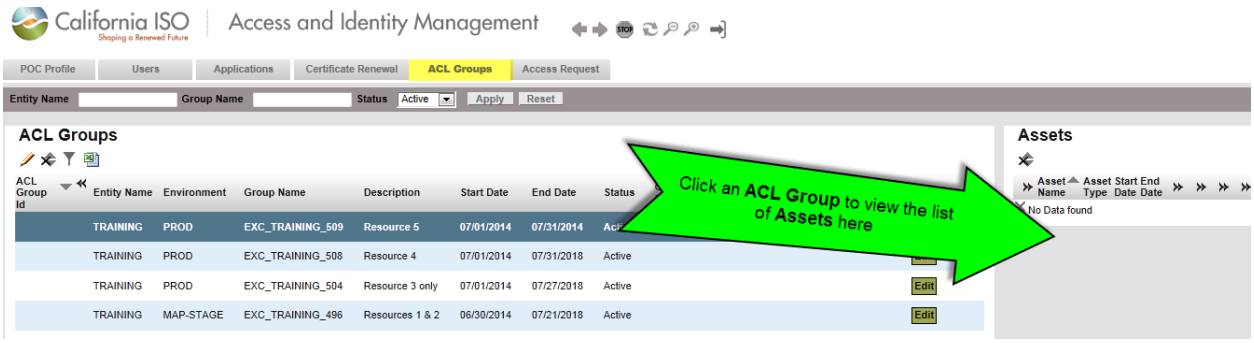
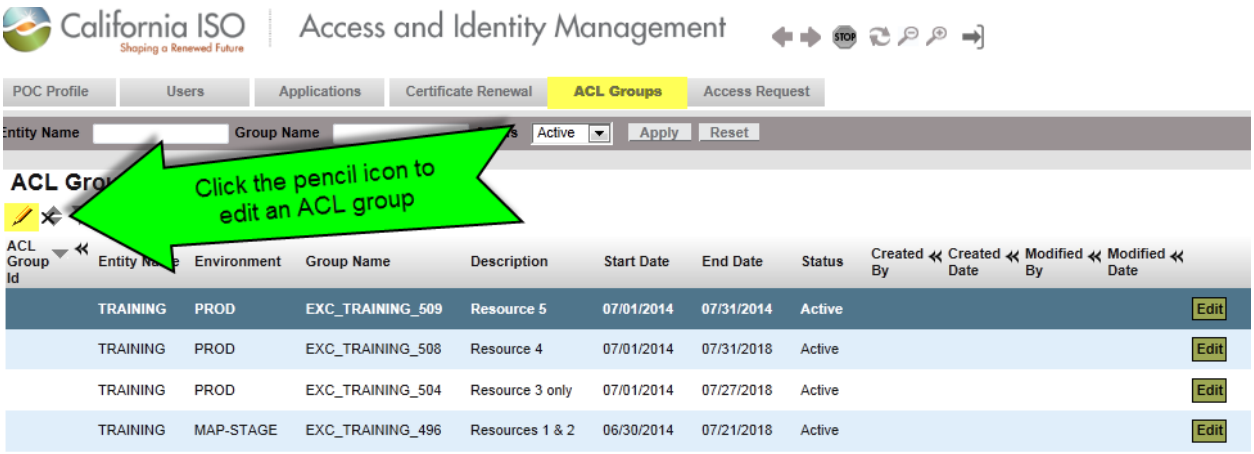
View ACL Group

Click on an entry in the **ACL Groups** section to view the list of asset(s) associated with that group.



Edit ACL Group

Click on an entry in the **ACL Groups** section to edit the group. Click on the pencil icon to change the **Description** of the **ACL Group** or adjust the **Start Date/End Date**. Click the **Update** button when finished.



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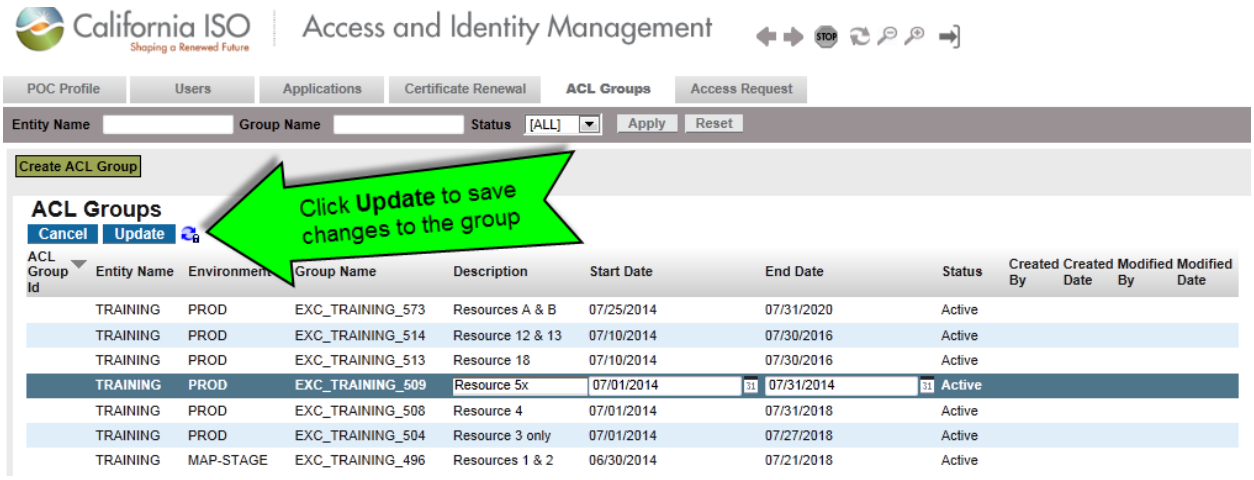

Note: An ACL Group cannot be deleted once it is created. If the ACL Group is no longer valid, the POC should adjust the End Date of the group. The **Status** of the ACL Group will be set to **Inactive** once the date has expired.

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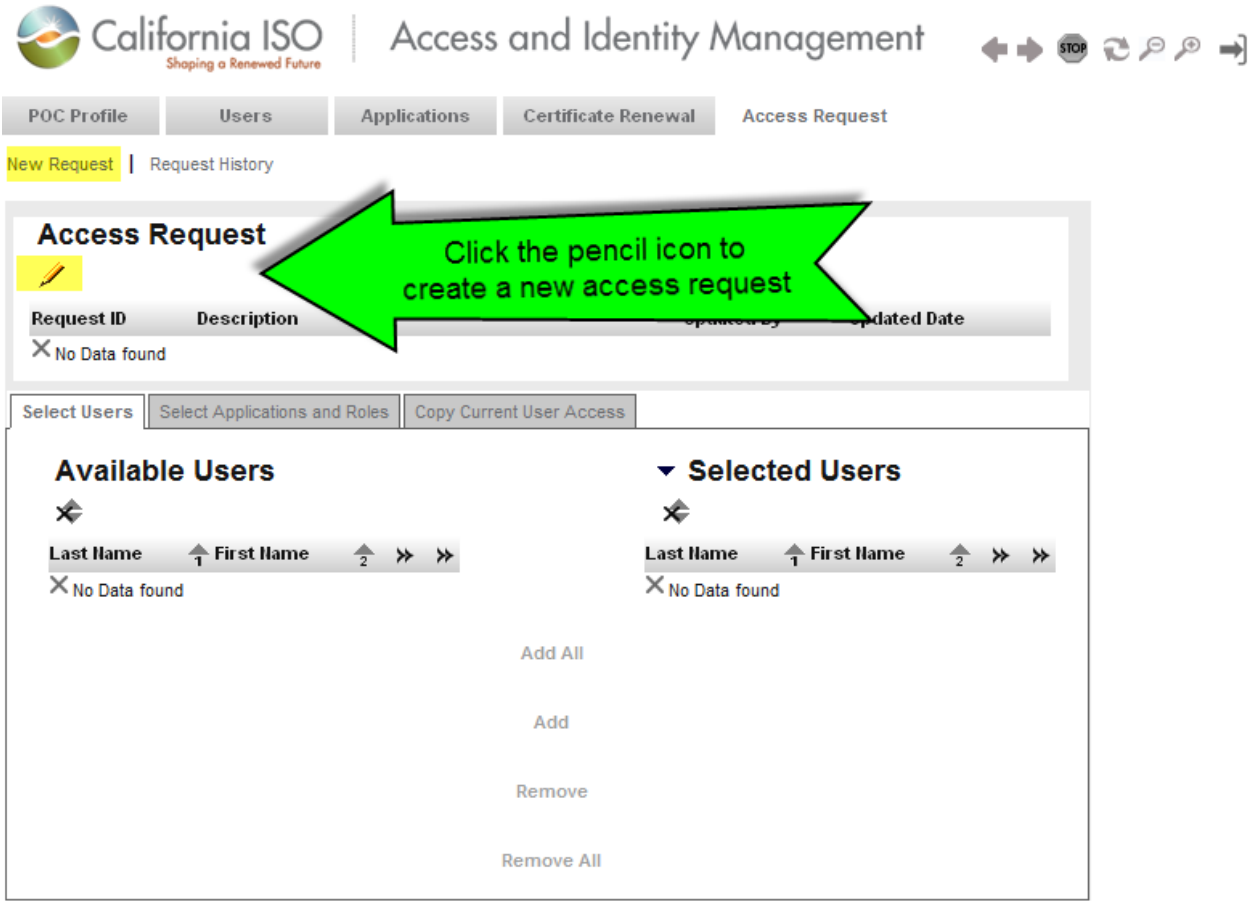
Access Request

The POC will use the **Access Request** screen to submit new application access requests as well as view the status of submitted requests.

New Request

Click the pencil icon and then the **New Row** button to create an access request.



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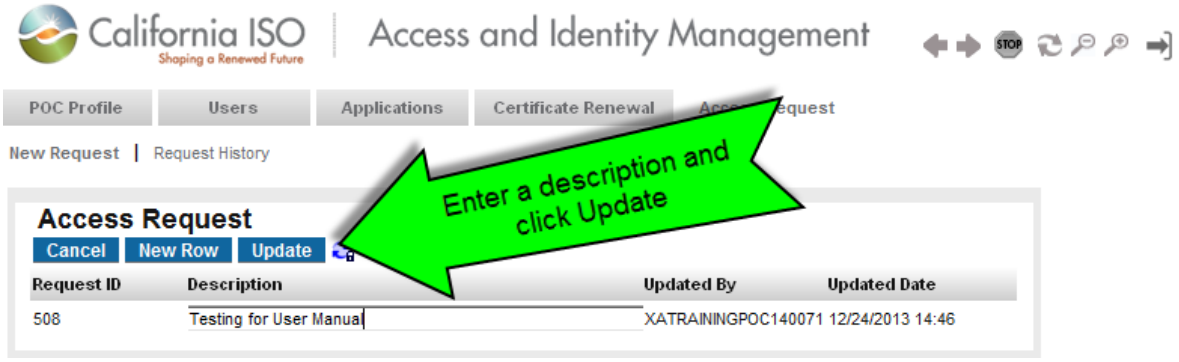
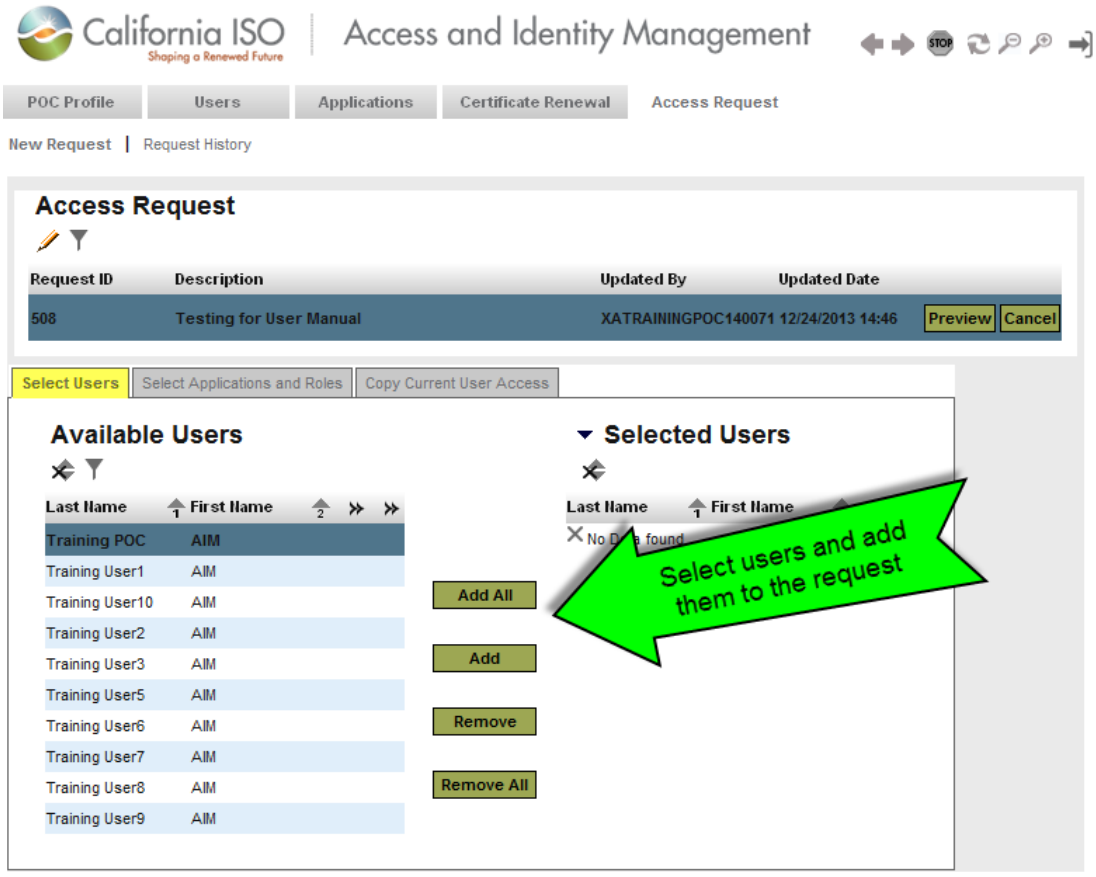
Enter a **Description** for the access request and click the **Update** button.



Select an individual user or use the **"Shift + click"** or **"Ctrl + click"** functionality to select multiple users and click the **Add** button. Or, click the **Add All** button to add all users to the request.



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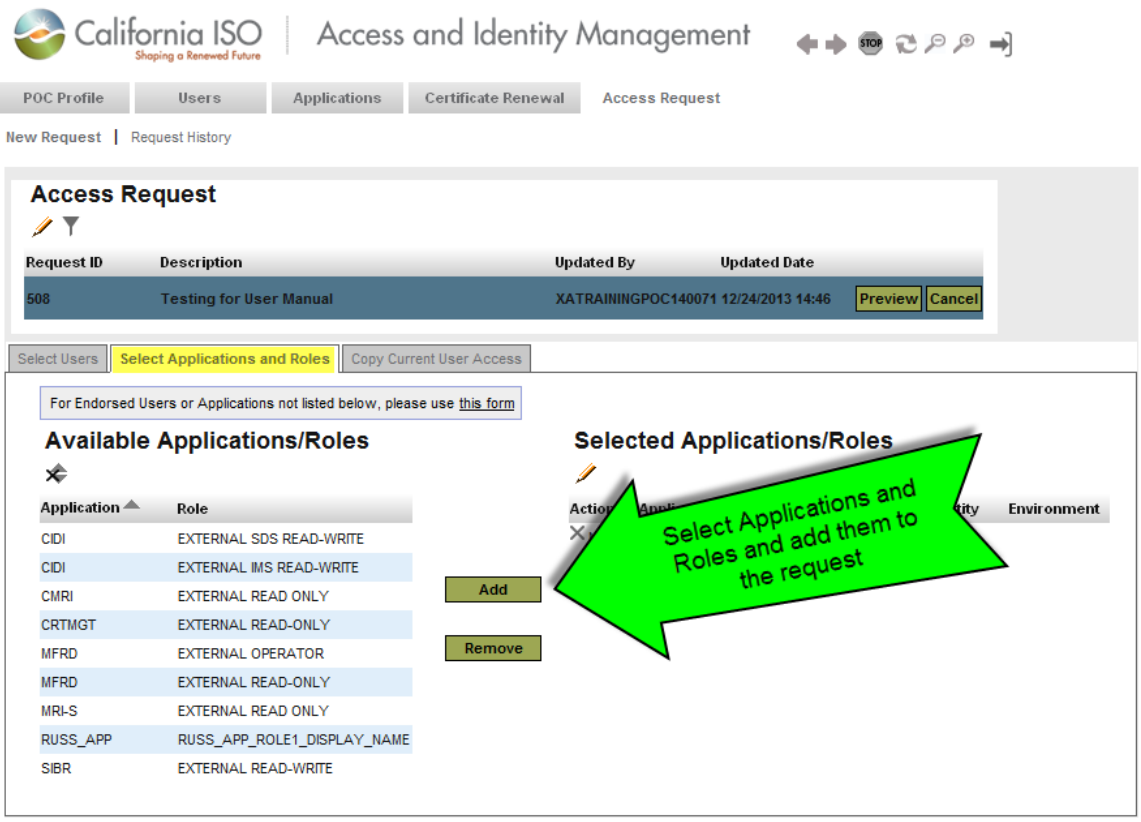
Select one or more applications and roles and add them to the access request.



Note: Requests to grant or remove access for an endorsed user are handled through CIDI and the AARF process. Newly-provisioned access for endorsed users will be visible within AIM after the next data sync period.

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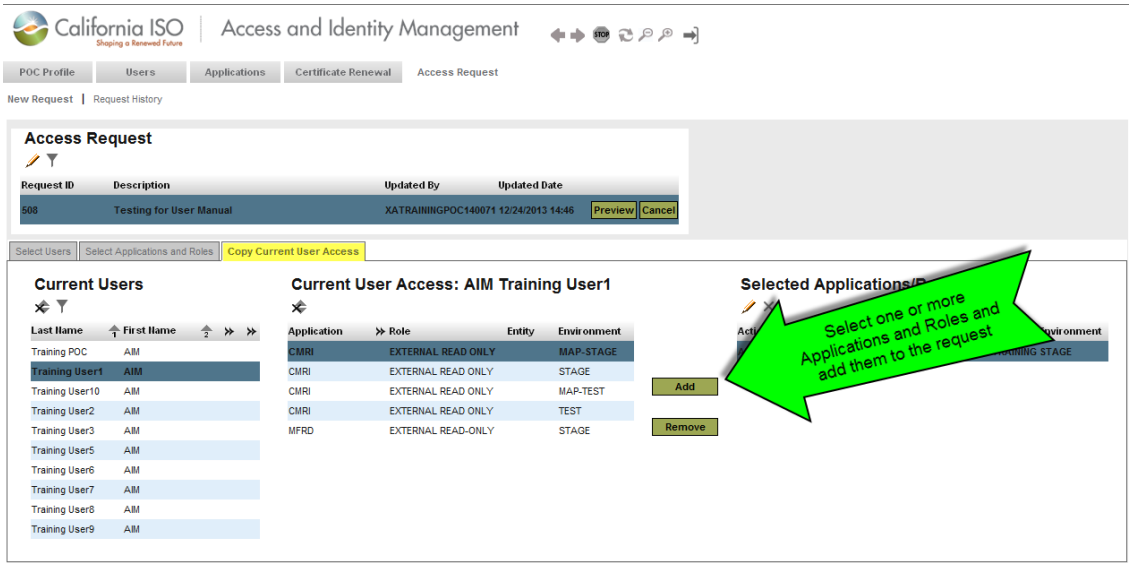
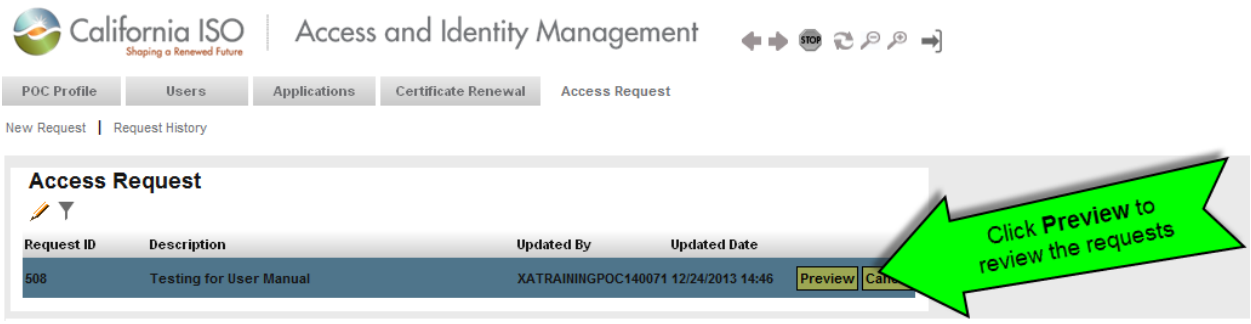
The **Copy Current User Access** tab allows the POC to view an existing user's access and select one or more applications and roles from that access to add to the request.



Click the **Preview** button to review the access request.



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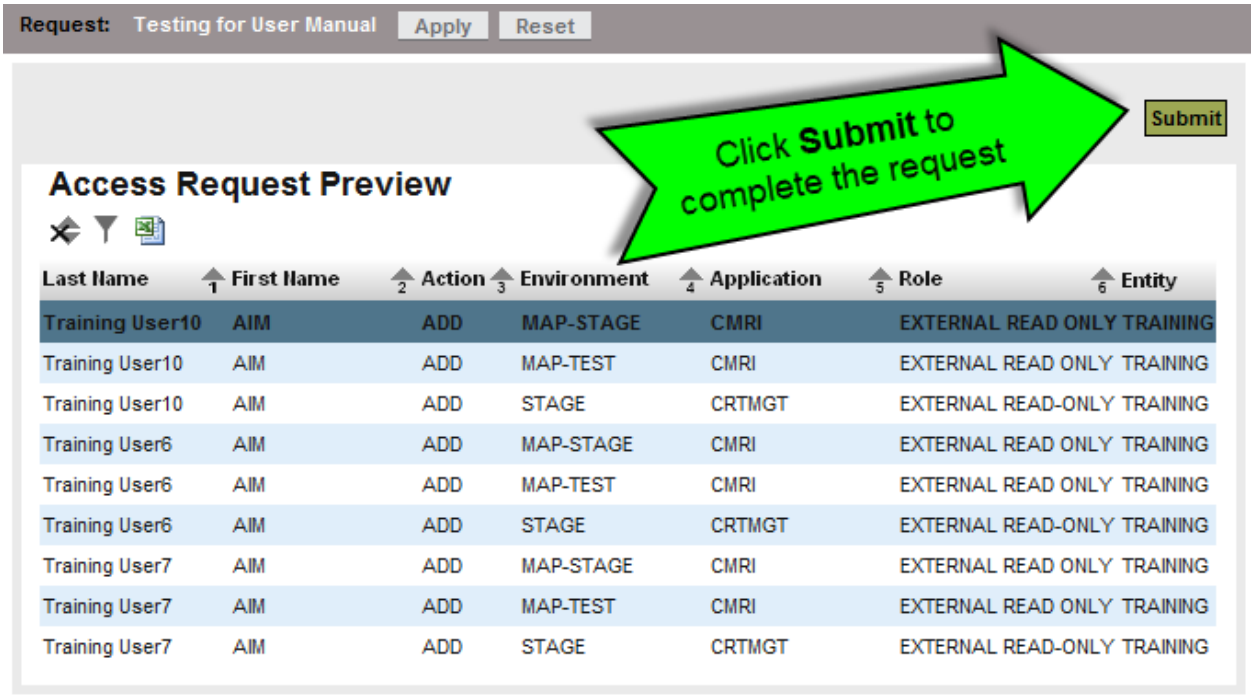
After reviewing the request, click the **Submit** button to complete the request.



Last Name	First Name	Action	Environment	Application	Role	Entity
Training User10	AIM	ADD	MAP-STAGE	CMRI	EXTERNAL READ ONLY	TRAINING
Training User10	AIM	ADD	MAP-TEST	CMRI	EXTERNAL READ ONLY	TRAINING
Training User10	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY	TRAINING
Training User6	AIM	ADD	MAP-STAGE	CMRI	EXTERNAL READ ONLY	TRAINING
Training User6	AIM	ADD	MAP-TEST	CMRI	EXTERNAL READ ONLY	TRAINING
Training User6	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY	TRAINING
Training User7	AIM	ADD	MAP-STAGE	CMRI	EXTERNAL READ ONLY	TRAINING
Training User7	AIM	ADD	MAP-TEST	CMRI	EXTERNAL READ ONLY	TRAINING
Training User7	AIM	ADD	STAGE	CRTMGT	EXTERNAL READ-ONLY	TRAINING

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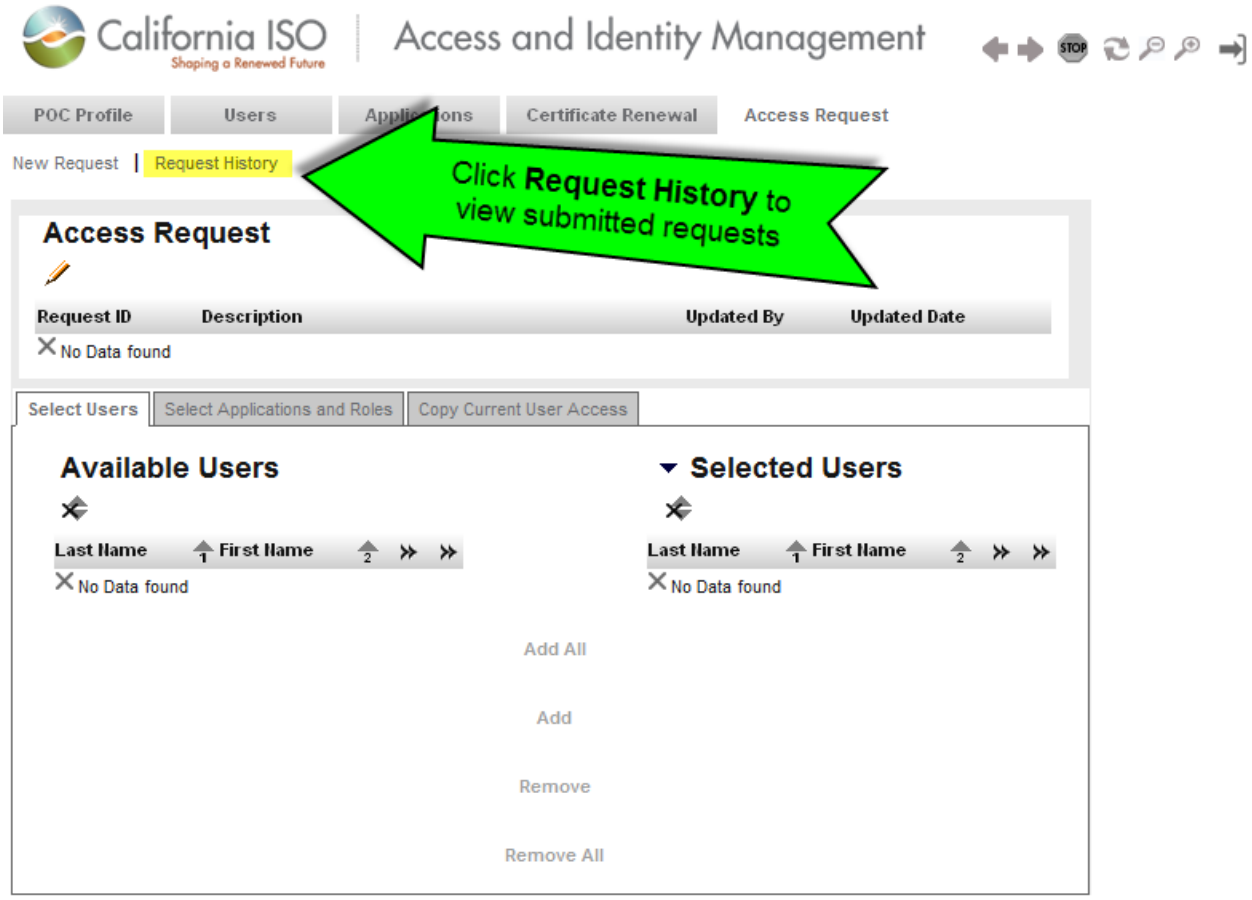
Request History

Click the **Request History** link to view a list of submitted requests.



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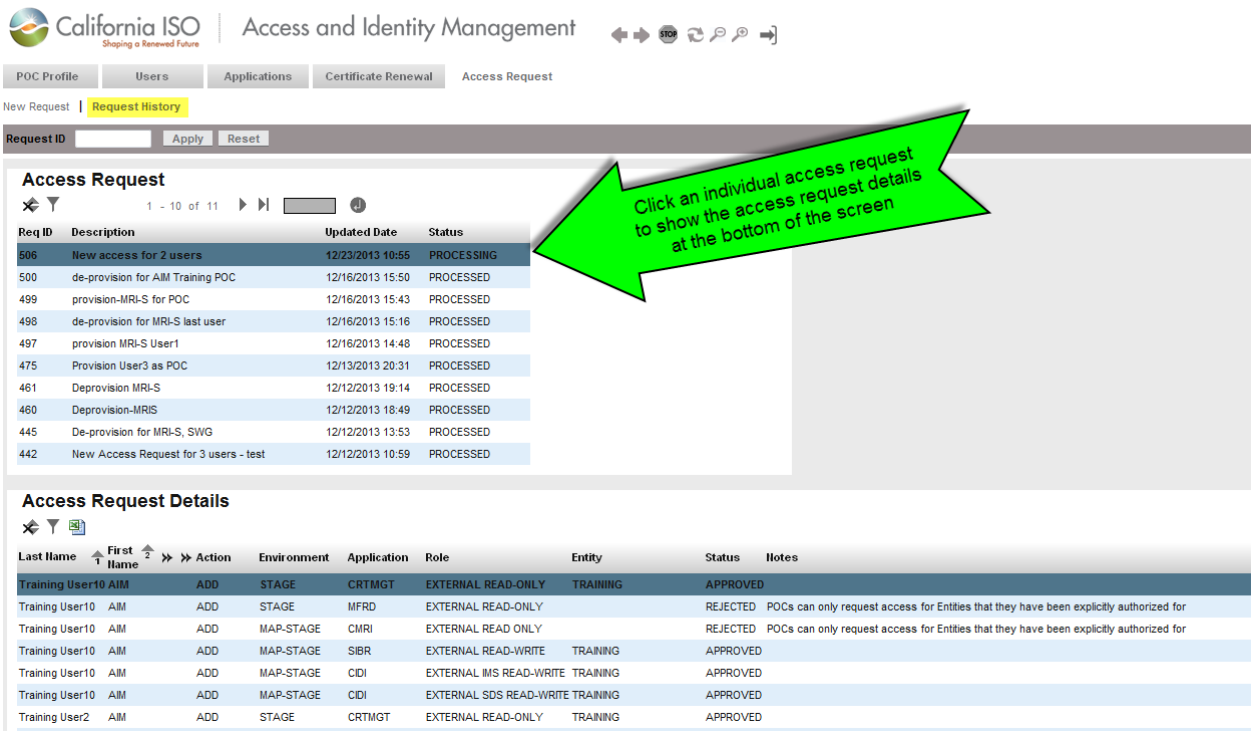
Click on an individual access request in the **Access Request** panel to show the **Access Request Details** at the bottom of the screen.


California ISO
Shaping a Renewed Future
Access and Identity Management
POC Profile
Users
Applications
Certificate Renewal
Access Request
New Request
Request History
Request ID
Apply
Reset
Access Request
1 - 10 of 11
Req ID
Description
Updated Date
Status
506 New access for 2 users 12/23/2013 10:55 PROCESSING
500 de-provision for AIM Training POC 12/16/2013 15:50 PROCESSED
499 provision-MRI-S for POC 12/16/2013 15:43 PROCESSED
498 de-provision for MRI-S last user 12/16/2013 15:16 PROCESSED
497 provision MRI-S User1 12/16/2013 14:48 PROCESSED
475 Provision User3 as POC 12/13/2013 20:31 PROCESSED
461 Deprovision MRI-S 12/12/2013 19:14 PROCESSED
460 Deprovision-MRIS 12/12/2013 18:49 PROCESSED
445 De-provision for MRI-S, SWG 12/12/2013 13:53 PROCESSED
442 New Access Request for 3 users - test 12/12/2013 10:59 PROCESSED
Click an individual access request to show the access request details at the bottom of the screen
Access Request Details
Last Name
First Name
Action
Environment
Application
Role
Entity
Status
Notes
Training User10 AIM ADD STAGE CRTMGT EXTERNAL READ-ONLY TRAINING APPROVED
Training User10 AIM ADD STAGE MFRD EXTERNAL READ-ONLY REJECTED POCs can only request access for Entities that they have been explicitly authorized for
Training User10 AIM ADD MAP-STAGE CMRI EXTERNAL READ ONLY REJECTED POCs can only request access for Entities that they have been explicitly authorized for
Training User10 AIM ADD MAP-STAGE SIBR EXTERNAL READ-WRITE TRAINING APPROVED
Training User10 AIM ADD MAP-STAGE CIDI EXTERNAL IMS READ-WRITE TRAINING APPROVED
Training User10 AIM ADD MAP-STAGE CIDI EXTERNAL SDS READ-WRITE TRAINING APPROVED
Training User2 AIM ADD STAGE CRTMGT EXTERNAL READ-ONLY TRAINING APPROVED

Note: An **Access Request** will begin with a status of “Submitted”. It will then move to “Processing”. Finally, it will have a status of “Processed”. This does not mean that all access was granted. The POC must review each of the line items in the **Access Request Details** to verify that access was granted to a specific user.

In the **Access Request Details** section, the status options are: Submitted, Approved, Processing, Completed, or Rejected.

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Step-by-Step Overview of AIM Functionality

Add a New User

1. To add a new user, navigate to the **Users** tab and click the **Create New User** Button.
2. Enter the user's first name, last name, email address, and address information.
3. Select an account type of Externals for an individual person or Externals_System for system accounts.
4. Click **Submit**.

Submit an Access Request

1. Navigate to the **Access Request** tab.
2. Click the pencil icon to add a new request.
3. Click the **New Row** button.
4. Type a description for the request and click the **Update** button.
5. From the **Select Users** tab, choose the names from the list of **Available Users**. (Note: Use "**Ctrl + click**" or "**Shift + click**" to select multiple names).
6. Click on the **Select Applications and Roles** Tab.
7. Click on the desired application and role and click the **Add** button. (Note: Use "**Ctrl + click**" or "**Shift + click**" to select multiple applications).
8. (Optional) To remove access, click on the drop-down button in the **Action** column to change the selection from ADD to REMOVE.
9. (Optional – **Copy Current User Access** tab).
    a. To view the access of a specific user in order to grant the same access to a new user, click the **Copy Current User Access** tab.
    b. Click a name in the **Current Users** panel to view that user's access in the **Current User Access** panel.
    c. Click on the desired application/role/environment and click the **Add** button. (Note: Use "**Ctrl + click**" or "**Shift + click**" to select multiple application/role/environment options).
10. After all users, applications, roles, and environments are selected, click the **Preview** button in the **Access Request** panel.
11. Review the request to ensure that it is accurate.
12. Click the **Submit** button in the **Access Request Preview** window to submit the request. (Note: If changes need to be made, close the preview window and edit the request as needed. Click the **Preview** button again, then click the **Submit** button.)

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Check Status of an Access Request

1. To check the status of an access request, navigate to the **Access Request** tab and click on the **Request History** link.
2. Click on an individual line item in the **Access Request** panel.
3. The list of items requested will display in the **Access Request Details** panel.
4. Review the **Status** column for each line item to verify that the requested access was granted.
    a. Submitted: The access request has been submitted and is waiting for the approval process to run.
    b. Approved: The access request has been approved and is waiting to be processed.
    c. Processing: The access request is being processed.
    d. Completed: The access request has been completed and the user can now access the application.
    e. Rejected: The access request has been rejected and will not be processed. See the notes column for the reason it was rejected.

Revoke a Certificate

1. To revoke a user's certificate, navigate to the **User** tab.
2. Find the correct user and click on the button in the **Profile** column.
3. From the **User Profile** screen, click the **Revoke User** button.
4. A confirmation message will appear that states: "Are you sure you want to revoke the user certificate and remove all application access for this user? This action cannot be undone."
5. Click **OK** to revoke the user's certificate.
6. Once the **OK** button is clicked, the certificate will be revoked and all application access will be removed. This change will be reflected in AIM after the next data sync period (usually within 12 – 24 hours).

Note: If a user's certificate is revoked by mistake, the POC must create a new user and reprovision all access for that user as there is no undo functionality for this action in AIM.

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Renew a Certificate

1. To renew a certificate, navigate to the **Certificate Renewal** tab.
2. The **Certificate Renewal** tab will display the **My Users With Expiring Certificates** list. This list will show all users whose certificates are expiring within 90 days or less. (Note: If the certificate expiration date is further into the future, the user will not appear on this list.)
3. Click the **Renew** button on an individual line item. Another option is to use the **"Shift + click"** or **"Ctrl + click"** functionality to select multiple users simultaneously. After selecting multiple users, click the **Renew Selections** button to apply it to all items selected.

Let a Certificate Expire

1. To let a certificate expire, navigate to the **Certificate Renewal** tab.
2. The **Certificate Renewal** tab will display the **My Users With Expiring Certificates** list. This list will show all users whose certificates are expiring within 90 days or less. (Note: If the certificate expiration date is further into the future, the user will not appear on this list.)
3. Click the **Let Expire** button on an individual line item. Another option is to use the **"Shift + click"** or **"Ctrl + click"** functionality to select multiple users simultaneously. After selecting multiple users, click the **Let Selections Expire** button to apply it to all items selected.

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Add ACL Group

1. To add an ACL group, navigate to the **ACL Groups** tab.
2. Click the **Create ACL Group** button to add a new group.
3. Select the **Entity Name**, **Environment**, and enter a **Description**.
4. Select a **Start Date** and an **End Date** and click the **Submit** button.

Add/Remove Assets from an ACL Group

1. To add or remove an asset from an ACL Group, navigate to the **ACL Groups** tab.
2. Click the **Edit** button next to the ACL group.
3. Select an asset from the **Available Assets** list and click the **Add** button to add an asset to the ACL group.
4. Or, select an asset from the **Assets** list and click the **Remove** button to remove it from the ACL group.

Note: The asset is automatically added to or removed from the group once the **Add/Remove** button is clicked. Simply close the window when the update is complete.

Edit ACL Group

1. To edit an ACL group, navigate to the **ACL Groups** tab.
2. Click on an entry in the **ACL Groups** section to edit the group.
3. Click on the pencil icon to change the **Description** of the **ACL Group** or adjust the **Start Date/End Date**.
4. Click the **Update** button when finished.

Note: An ACL Group cannot be deleted once it is created. If the ACL Group is no longer valid, the POC should adjust the **End Date** of the group. The **Status** of the ACL Group will be set to **Inactive** once the date has expired.

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Features of User Interface

Application Toolbar

The application toolbar contains the application or browser-based functions.

	Goes to the previous display in browsing history
	Goes to the next display in browsing history
	Stops loading the current display
	Refreshes the display in the current window
	Zoom out
	Zoom in
	Log out

Filter Toolbar – User Access Tab

The filter toolbar contains the account filtering options.

Apply	Refreshes user data with the filters
Reset	Restores filters to default settings
* wildcard search	Use the asterisk (*) wildcard symbol to search for user information. (e.g. Enter **Chris*** in the **First Name** field and click the **Apply** button to display a list of users whose first names begin with “Chris”. The search results will display users who are named Chris, Christopher, Christine, etc.) To ensure that you see all records meeting your search criteria add the “*” at the end to display multiple records.

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Filter Toolbar – Applications Tab

The filter toolbar contains the account filtering options.

Apply	Refreshes application data with the filters
Reset	Restores filters to default settings
* wildcard search	Use the asterisk (*) wildcard symbol to search for application information. (e.g. Enter **CISO*** in the **Entity** field and click the **Apply** button to display a list of applications and users for all SCID's that begin with "CISO". The search results will display results for CISO, CISO1, CISO2, etc.)

Results Window

	Restore sort to default setting (removes user-created multiple column sorting, which is described in detail on the following page)
	The Inline Filter works as a toggle. Click the icon to filter data based on the content of a particular column. Press **Enter** after entering the filter criteria. (Note: Wildcard symbols can be used in this column, but they are not necessary. For example, searching for *POC* or POC will provide the same results.)
	Exporting (to Excel, Word, CSV)
	Printing. (Note: The Print Menu is accessible from the Current User Access, Current Endorsed User Access, and Entity Assets pages.)

Results Window – Multiple Pages

	Navigate to the first page of data
	Navigate to the previous page of data
	Navigate to the next page of data
	Navigate to the last page of data
	Go to specific line item entered in search box

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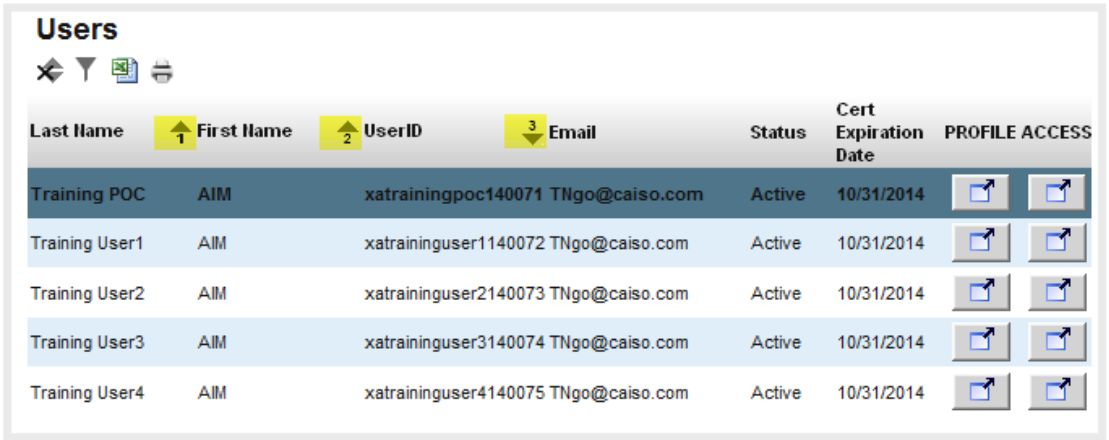
Multiple Column Sorting

Clicking on a column in the results window enables the user to sort the data in ascending or descending order.

Here is an example of how to use multiple sorting:

- Click a column header. The data is sorted in ascending order and the following icon appears in the column header: ▲. This indicates the first level sorting.
- Click another column. The data is sorted in ascending order. The icon in the first column changes to: ▲1. The following icon appears in the second column: ▲2. This indicates the second level sorting.
- Click another column. The data is sorted in ascending order and the following icon appears in the column header: ▲3.
- Click the same column again. The data is sorted in descending order. The icon in the column header is changed to: ▼3.
- Continue to click column headers to deselect and then reprioritize the sorting order.

The following image shows the example explained above:



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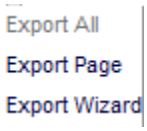
Export Menu

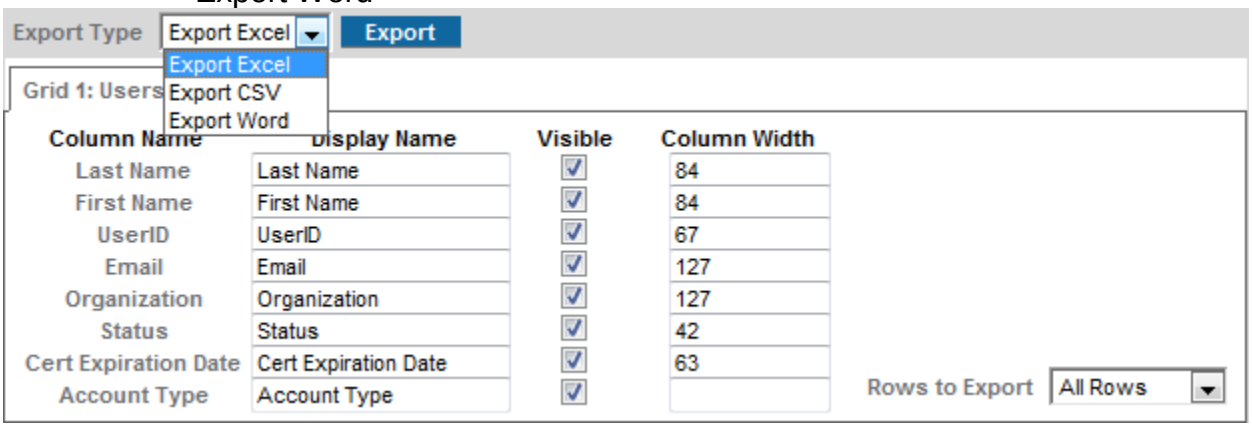


Export All	All data points will be exported to Excel
Export Page	The current page will be exported to Excel
Export Wizard	The user can customize the data export

Export Wizard

The Export Wizard enables the user to export data in the following three file types:

- Export Excel
- Export CSV
- Export Word



The Export Wizard can be customized using the following options:

- Enable Grid Export: If a display contains multiple grids, the user can select specific grids to export. (Note that the CSV format can only export one grid).
- Display Name: The user can modify the name of a column that will appear in the data export.
- Enable/Disable Column Visibility: The user can select which columns to include in the exported file.
- Custom Column Width: The user can choose to modify the width of a specific column
- Rows to Export: All Rows, or the Original Page

Once the user has selected the export parameters, click the **Export** button to generate a file.

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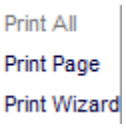
Note: The maximum number of rows that can be exported is 10,000. If the number of rows available exceeds 10,000, only the first 10,000 rows will be exported. It is recommended to use filters to limit the number of results that are displayed in order to export all rows.

Print Menu

The Print Menu is accessible from the **Current User Access, Current Endorsed User Access,** and **Entity Assets** pages.



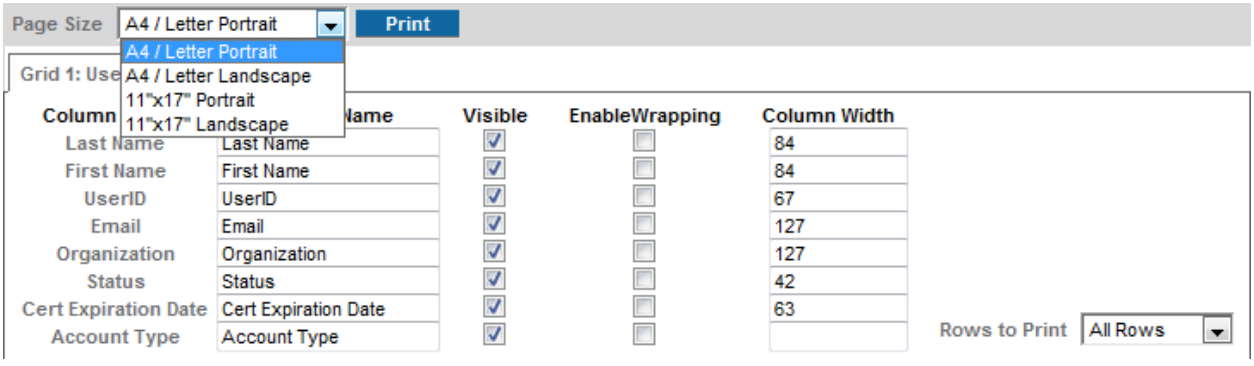
Print All	All data will be printed
Print Page	Only the data shown on the current page will be printed
Print Wizard	The user can customize the data that is printed

Print Wizard

The **Print Wizard** provides the option to print in the following four combinations of page size and orientation:

- A4 / Letter Portrait
- A4 / Letter Landscape
- 11”x17” Portrait
- 11”x17” Landscape

Note: The option for portrait or landscape must also be set in the standard printer selection window.



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The Print Wizard can be customized using the following options:

- Enable Grid Print: If a display contains multiple grids, the user can select specific grids to export.
- Display Name: The user can modify the name of a column that will appear on the printed document.
- Column Visibility: The user can select which columns to include on the printed document.
- Enable Wrapping: The user can choose to enable or diable text wrapping for a column.
- Custom Column Width: The user can choose to modify the width of a specific column.
- Rows to Print: The user can choose to print All Rows, or just the Original Page.

After the user has selected the print parameters, click the **Print** button. AIM will generate a print preview, as shown below.

Note: The column names do not appear in the print preview window. However, the column names will appear on the hard copy of the document.

Print
AIM > User Access
XATRAININGPOC140071 | 08/22/2013 14:34 PDT
Grid 1: Users
Page 1 of 1
Training POC AIM xatrainingpoc140071 TNgo@caiso.com Training Organization Active 10/31/2014 EXTERNALS
Training User1 AIM xatraininguser1140072 TNgo@caiso.com Training Organization Active 10/31/2014 EXTERNALS
Training User2 AIM xatraininguser2140073 TNgo@caiso.com Training Organization Active 10/31/2014 EXTERNALS
Training User3 AIM xatraininguser3140074 TNgo@caiso.com Training Organization Active 10/31/2014 EXTERNALS
Training User4 AIM xatraininguser4140075 TNgo@caiso.com Training Organization Active 10/31/2014 EXTERNALS

After reviewing the print preview, click the **Print** button and the standard print window will display.

Choose a printer from the list and modify the printing preferences as appropriate (e.g. portrait or landscape) and print the document.

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